

CHECKLIST

SMSF Application

Information required to open a Smarter Money Account

Fund Name: Smarter Money Fund (Active Cash) Smarter Money Higher Income Fund Long-Short Credit Fund

Primary Contact Details

Full Name			
Email			
Postal Address			
Mobile Phone			
Mailing Preference	<input type="checkbox"/> Email <input type="checkbox"/> Paper	Send to	<input type="checkbox"/> Investor <input type="checkbox"/> Adviser <input type="checkbox"/> Both

SMSF Details

Super Fund Name			
ABN/ACN			
TFN			

Trustee/Corporate Director Details

Director 1 - Full Name			
DOB			
Residential Address			
Director 2 (if applicable) - Full Name			
DOB			
Residential Address			

Corporate Trustee Details (if applicable)

Trustee Name			
ABN/ACN			

Investment Details

Investment Amount	\$		
Distributions	<input type="checkbox"/> Reinvested	<input type="checkbox"/> Paid out	
Operating Authority	<input type="checkbox"/> Any one to sign	<input type="checkbox"/> Both to sign	

Bank Account Details

Bank Name			
Branch Name			
BSB			
Account Number			
Account Name (must be same as investor)			